

Indiana

Department of Local Government Finance



Committed to a fair and equitable property tax system for Hoosier taxpayers.

Leap Day Treasurer Meeting

Charlie Bell
Director of Operations

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Agenda

- Statement of Taxes and Assessments Update
- Data Upload Tool Demo
- System Certification Update
- Questions



Statement of Taxes and Assessments Update

- Form is required as defined by IC 6-1.1-22-8
- Required for all property taxes and special assessments due and payable after December 31, 2007
- Current and delinquent taxes and special assessments
- Amount of liability by each levy authority including rate, identification of taxing authority, and amount owed
- Comparison of changes in assessed valuation for the current and previous year
 - amount of the taxpayer's liability distributable to each taxing unit
 - the percentage change distributable to each taxing unit

Statement of Taxes and Assessments

- Explanation is required for:
 - The homestead credit
 - All property tax deductions
 - The procedure and deadline for filing for the homestead credit and each deduction
 - The procedure for filing an appeal of the current assessment and correction of error including any forms required for these filings

Statement of Taxes and Assessments

- Layout is based on 8.5 x 14 legal size document
- Label placement would be for #10 window envelope
- 3 color
- 4, possibly 5, separate data tables

Summary of Taxes

Gross assessed value

- Minus deductions

= Subtotal of net assessed valuation

- * Multiply by tax rate

= Equals tax due

- Minus State property tax relief

- Minus local property tax relief

- Minus property tax circuit breaker

= Total property tax due for current year

Summary of Taxes

Total property tax due for current year
+ other applicable charges owed
+ current year overdue taxes
+ prior year overdue taxes
Total tax due this year



Data Upload Tool Update

- Thank you to our Partners:
 - Legislative Services Agency
 - Indiana Business Research Center at the Kelley School of Business
 - State Budget Agency
- DLGF Field Representatives are being trained and will be visiting Counties in the coming weeks.



Need Found

- Indiana counties are required to provide property tax management files to the State Department of Local Government Finance (DLGF) and Legislative Services Agency (LSA) annually.
- These files are used as a basis for determining tax rates, local budgets and property tax relief.
- DLGF is required to analyze and certify data submitted by the counties in a timely manner.
- DLGF has determined that previous practices for evaluating data submitted by counties did not provided the level of detail required by the county governments to adequately correct deficiencies found.



Goals Set

- Collect Valid Data From Counties
- Provide Adequate Feedback for Corrections
- Certify Data Submitted in a Timely Manner
- Analyze Data



Partnership

- IBRC Partnership
(Indiana Business Research Center at the Kelly School of Business)
 - Building a web based means for County data submissions
 - Tool provides testing capabilities for Counties
 - Web tool will automate the initial upload and review of data
 - Tool provides detailed feedback to Counties on data submission in a timely manner



Upload Tool Description

- The Property Data Upload Application is an Internet web based tool
- Tool provides a means for County data submissions using the web to upload compressed (zipped) data files.
- Tool automates initial upload and review of data submissions
- Tool provides testing capabilities for Counties
- Tool provides detailed feedback to Counties on data submission in a timely manner, generally 24-48 hours



Upload of Data Files

- This tool allows for upload of the following required county property tax management files to DLGF:
 - Parcel data files including PARCEL.TXT, LAND.TXT, IMPROVE.TXT, DWELLING.TXT, BUILDING.TXT, BLDDETL.TXT, and APPEAL.TXT.
 - Personal property data files including PERSPROP.TXT, POOLDATA.TXT, APPEALPP.TXT, MOBILE.TXT, APPEALMH.TXT, and OILGAS.TXT.
 - Sales disclosure data file including SALEDISC.TXT.
 - Tax billing data files including TAXDATA.TXT and ADJMENTS.TXT.



Methods for Uploading

■ Testing Files

- Users can upload and run data files through the standardized verification and quality control checks to determine what, if anything, that may need reviewed and/or corrected prior to officially submitting the files
- Counties are strongly encouraged to make use of the testing mode so that any problems can be corrected prior to official submission
- The testing mode can be used as many times as necessary to assure the quality and accuracy of the content of the files prior to official submission

■ Official Submissions



Enhanced Reporting

- Verification of file essentials will be conducted immediately after upload
- Notification is sent directly to officeholders responsible for submission, information system staff, and contacts as identified in each header for each file submitted upon receipt
- Tool tests for compliance with established format specifications contained within the published Data Standards
- Tool also tests for obvious errors found in the content of the submitted file



Enhanced Reporting

- Verification and cross-file analysis of files will be conducted within 24 to 48 hours after upload
- Detailed feedback on the compliance and content of the files submitted is provided in a comprehensive detailed record report for use by county officials
- Summary reports provide overview of errata found to help identify systematic errors



Access to the Reports

- E-mail notifications are sent to officeholders responsible for submission, information system staff, and contacts as identified in each header for each file submitted upon receipt
- E-mail notifications are sent to officeholders responsible for submission upon completion of detail reports
- E-mail notifications are sent to officeholders responsible for submission in the event submitted files have been rejected by the upload tool
- Reports are also stored on the application server in a county specific subdirectory, accessible via a secure web access account



Secure Access to Tool

- County Assessors and County Auditors are provided a login and password to access the Property Data Upload Application
- County officials are granted access to view the resulting reports for their county only
- Reports are accessible via the secure web access account
- These reports can be downloaded and used by county staff and/or contracted vendors to correct any deficiencies found in the file submissions



Instruction & Documentation

- Available online; documentation, instructions, FAQs
- E-mail DLGF for assistance
- Provide feedback



Demonstration

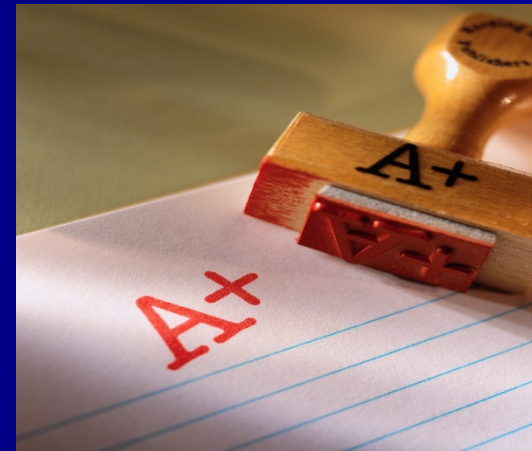
Property Data Upload Application:

<http://www.in.gov/dlgf/local/>



System Certification Update

- Status Update
- Q&A Update
- Rule Update





Contact Us

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